Hold Pickup Locations Map

Use this screen to create or edit rows in the hold pickup locations map in order to display the most appropriate pickup options for holds and prevent requests from pickup locations that are not supported.

To access this screen, sign in Service Configuration, open the WMS Circulation left navigation, select Holds and Schedules, and then select the Hold Pickup Locations Map link.

Use this screen to apply available hold pickup locations to user hold requests.

Processing order

The system evaluates the rows in the map in this order until a match is found:

1. Top to bottom (rows)
2. Left to right (settings in rows)

When the system comes to the row where all the elements match the transaction, it applies the policy contained in that row and will not continue to the next row.

- To change a row's position on the map, use the up (↑) and down (↓) arrows.

Notes:

- If the system cannot find a row in the map, the hold will not be able to be placed.
  - Once you have successfully saved the map with at least one valid policy row, WMS will use the map to control where items can be picked up.
  - If the map is configured but no relevant row is found, then no pickup locations are allowed and new holds will be prevented. Items that cannot be routed to the pickup location selected in the hold will not appear on the pull list or fulfill the request at check in.

Create or edit rows in the hold pick up locations map

By default, the Hold Pickup Locations Map is empty. The branch locations configured in the WorldCat Registry will be the default set of pickup locations used by the system. See Relationships for more information. All locations will be available to all patrons for pickup location if rows are not added to the map.

- A new branch location is not automatically valid if its branch was previously selected in the map. Update the Hold Pickup Locations Map when you add new branch locations.

- Default Pickup Location and Alternate Pickup Location will allow libraries to select branches as long as the branch has no branch locations/sublocations configured.

All existing circulation policies will continue to be honored. For example, if a valid pickup location exists but the
requested item(s) cannot fulfill holds per your Location Policy, then the system will reject the request.

The map can be changed at any time. Prior to editing the map, review the Open Holds Report to ensure that existing holds are appropriately cancelled or updated to a new pickup location to ensure that existing holds are not removed because a location is no longer available to fulfill the hold. See Circulation Reports, Open Holds Report for more information.

1. On the Hold Pickup Locations Map screen, fill in the fields in the order below:
   1. **Patron Type**: Patron types, as set in the Institution Borrower Categories.
   2. **Patron Home Branch**: The home branch assigned to patrons. See Relationships for more information.
   3. **Material Format**: Material format is defined in an item’s WorldCat record. For more information, see Material Type Names and Codes to determine how the WorldCat record provides material format.
   4. **Holding Location**: Holding Code, as set on the Holding Codes Translation Table screen. You must select a holding location in order to select a shelving location.
   5. **Shelving Location**: Shelving Location, as set on the Holding Codes Translation Table screen. If an item has a temporary and permanent location in WMS, the circulation policy will use the temporary location.
   6. **Default Pickup Location**: Select the best pickup option available to patrons. The Default Pickup Location preselects a pickup location when users create new hold requests in WorldCat Discovery and WorldShare Circulation.
      - Configured in Admin/General, Branch Locations.
      - A default will be preselected by the system for title-level (Any Copy) or special requests if all items related to the requested title share the same default pickup location.
   7. **Alternate Pickup Location**: Other pickup options that are supported by your library. The alternatives can be selected when users create or edit hold requests in WorldCat Discovery, My Account, or WorldShare Circulation.
      - Configured in Admin/General, Branch Locations.
   8. **Add/Delete** (rightmost column):
      - To add a row, click the Add button (➕).
      - To delete a row, click the Remove button (🗑).
      - To change a row’s position on the map, use the up (⬆️) and down (⬇️) arrows.

2. Click Save.

Libraries with group aware

Participants in a circulation group can use the Hold Pickup Locations Map to control where their institution's items are allowed to be picked up.

- The Holding Location and Shelving Location parameters are limited to the library's locations.
- The Patron Type, Patron Home Branch, Default Pickup Location, and Alternative Pickup Locations are group aware to specify what options are available for patrons of other institutions and/or which pickup locations at other institutions are supported for the library's materials.

https://help.oclc.org/Library_Management/WorldShare_Circulation/Configuration/OCLC_Service_Configuration... Printed: Fri, 18 Mar 2022 06:11:21 GMT